

Defense Travel System

Training Concept of Operations (CONOPS)



Version 1.9

Date created: 1 November 2002

This document is controlled by the PROGRAM MANAGEMENT OFFICE-DEFENSE TRAVEL SYSTEM. A printed copy of this document is an uncontrolled copy.

Document Approval Page

The following individuals have approved this document as evidenced by signature and date contained herein. *

Signature //ORIGINAL SIGNED//

Date: 5 Jun 02

Larry Schaefer, Col, USAF, Program Director, Program Management
Office-Defense Travel System

Signature //ORIGINAL SIGNED//

Date: 4 Jun 02

Alan Tomson, COL, USA, Fielding Branch Chief, Program Management
Office-Defense Travel System

***Note: Original signatures are on file at the PMO-DTS.**

Document History

Control ID	Date	Version	Author	Description of Activity
PMO-CON-FLD-041002-1.0	10 April 02	Preliminary	C. Oldroyd	Original Draft
PMO-CON-FLD-041002-1.1	19 Apr 02	Revision	C. Oldroyd	Revisions to original draft based on Fielding Branch Chief comments. Additional information on DTA duties added. Corrected Web address format.
PMO-CON-FLD-041002-1.2	1 May 02	Revision	C. Oldroyd	Revised signature page. Updated DTA information to include TO.
PMO-CON-FLD-041002-1.3	8 May 02	Revision	C. Oldroyd	Changed all references from CUI to DTS. Updated FDTA information in Section 6.1.3.
PMO-CON-FLD-041002-1.4	13 May 02	Revision	C. Oldroyd	Updated document for grammar and formatting recommendations.
PMO-CON-FLD-041002-1.5	28 May 02	Revision	C. Oldroyd	Updated document for changes requested by Deputy PD.
PMO-CON-FLD-041002-1.6	31 May 02	Revision	C. Oldroyd	Updated document for changes requested by Program Director. Incorporated CM QA review comments.
PMO-CON-FLD-041002-1.7	4 June 02	Final Draft	L. Bouvier	Corrections to format of paragraphs, spacing, minor editorial issues like commas.
PMO-CON-FLD-041002-1.8	24 Sep 02	Revision	C. Oldroyd	Revised document for addition of DTS WEB site (Sec 7), EWTS information in (Sec 9), and training location options (Sec 10).
PMO-CON-FLD-041002-1.9	1 Nov 02	Revision	C. Oldroyd	Revised document for TTT information (Sec 5.1) and WEB training information (Sec 7).

NOTE: you may record the reviewers (as distinct from the approvers) with the description of activity above or in the emails or meeting minutes archived with the document as separate files.

TABLE OF CONTENTS

1	INTRODUCTION.....	1
2	SCOPE	1
3	TRAINING PHILOSOPHY	1
4	RESPONSIBILITIES	2
4.1	PMO-DTS	2
4.2	DoD SERVICES/AGENCIES	2
4.3	TRW	2
5	TRAINING PROGRAM	2
	FIGURE 1. DTS SAMPLE TRAINING PROGRAM	3
5.1	DTA TRAINING.....	3
5.2	TTT TRAINING	3
5.3	HELP DESK TRAINING.....	4
6	SELECTING PARTICIPANTS/TRAINING COURSE PREREQUISITES.....	4
6.1	DTA TRAINING.....	4
6.2	TTT TRAINING	5
6.3	HELP DESK TRAINING.....	5
7	ADDITIONAL TRAINING INFORMATION	6
8	DELIVERY OF TRAINING	6
9	ENTERPRISE WEB TRAINING SYSTEM (EWTS).....	6
9.1	GOVERNMENT TRAINING	7
9.2	TRW TRAINING	7
10	COORDINATION AND SUPPORT	7
11	ADDITIONAL TRAINING FOR PHASE I & II SITES AND PHASE III SITE TRAINING	8
11.1	PHASE I & II	8
11.2	PHASE III	8

TABLE OF FIGURES

FIGURE 1. DTS SAMPLE TRAINING PROGRAM	3
--	----------

1 INTRODUCTION

The introduction of a significantly different way of executing and managing travel for the Department of Defense (DoD) is a major undertaking, which will succeed only if the users and supporters of the system are knowledgeable and competent in their roles and responsibilities. Consequently, a comprehensive Defense Travel System (DTS) Training Program that integrates both government and vendor training is essential to the effective fielding of DTS.

Successful execution of the DTS Training Program will also require close coordination with and cooperation of the Services and Agencies that will be fielding the system.

This document delineates the responsibilities, audiences, prerequisites, and training events that currently comprise the DTS Training Program.

2 SCOPE

The DTS Training Program consists of two training partners: the Program Management Office-DTS (PMO-DTS) and TRW, Inc.

Government training is provided by PMO-DTS instructors and is designed to address government regulations, policies and procedures applicable to the DTS traveler. PMO-DTS instructors will also provide training on Help Desk set-up and operations for DTS.

TRW instructors address functional use of DTS software and the specific organizational set-up procedures for Defense Travel Administration (DTA) personnel as well as use of DTS software by organizational trainers (Train-the-Trainer) and their roles in training Authorizing Officials (AOs) and travelers. TRW also provides information on Tier 3 Help Desk procedures and how they pertain to DTS. Additionally, training of Commercial Travel Office (CTO) personnel in use of DTS software and procedures, as required, is the responsibility of TRW.

3 TRAINING PHILOSOPHY

The training required to support implementation of DTS is an important part of fielding DTS. Training of the majority of DTS users (i.e., DTAs, AOs, and travelers) will be accomplished using both functional and Train-The-Trainer (TTT) approaches. In this regard, it is essential that organizations ensure they send the best-suited individuals to the appropriate training sessions. An examination of the information in Section 6 of this document will assist organizations in identifying which individuals should attend DTA, TTT, and/or Help Desk training and, if any, the required/recommended course prerequisites.

The lessons within the DTS Training Program have been developed to capitalize on the user-friendly nature of DTS, and are based on the assumption that all users of DTS possess a basic proficiency in using a Windows-based operating system. Ideally, training participants should have more than a basic proficiency. Because the DTS Training Program does not contain any instruction on the use of a computer or windows-based operating system, any remedial instruction needed in those areas is an organizational responsibility.

The DTS Training Program materials will be refined and perfected throughout DTS fielding. The goal is to make the training more efficient, to minimize the number and duration of classroom lessons, and to eventually convert as much of the instruction as feasible from a paper-based to an electronic (Internet/computer based) product. These steps will increase ready access

to DTS information and provide greater flexibility to organizations in accomplishing the training needed to implement and sustain DTS.

4 RESPONSIBILITIES

4.1 PMO-DTS

The PMO-DTS is responsible for oversight of the entire DTS Training Program and for the development, coordination, distribution, and execution of all information contained therein. The PMO-DTS will also, in coordination with TRW, develop a training schedule that supports site fielding while ensuring adequate training for each site.

4.2 DoD Services/Agencies

The Service and Agency representatives for DTS assist the PMO-DTS in the coordination and execution of the DTS Training Program. They provide qualified individuals, in accordance with prerequisites outlined in this document, to attend appropriate DTS training courses and ensure all allocated training seats are filled. They also provide adequate facilities/equipment and for connectivity to the DTS Enterprise WEB Training System (EWTS) to conduct DTS training IAW the requirements outlined in the training survey that will be completed as part of the site fielding plan.

With the support of the DTS Training Program, they develop the requisite training capability to support fielding of DTS within their Service/Agency. Service/Agencies will be responsible for developing and conducting any additional unique training for their own organizations.

They are responsible for their Service/Agency TDY funding for attendance at any DTS training functions.

4.3 TRW

TRW develops and conducts training on the organizational set-up and use of the DTS travel software by DTAs, organizational trainers, AOs and travelers. TRW provides training teams and equipment, as necessary, to support the conduct of training and the DTS training schedule. Also, as required, they provide necessary training for CTO personnel and, in coordination with the PMO-DTS; conduct CTO seminars at specific DTS fielding locations.

5 TRAINING PROGRAM

The main components of the DTS Training Program are the DTA Functional Training, TTT, and Help Desk Training. All of these training sessions are designed to be conducted over a 2-week period based on the site's fielding schedule. A sample training schedule is shown in Figure 1.

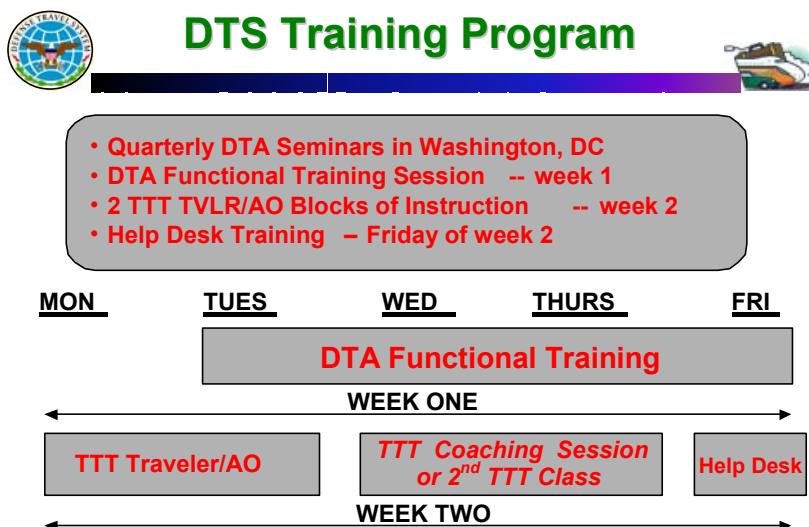


Figure 1. DTS Sample Training Program

5.1 DTA Training

DTA training will be accomplished in two phases:

First, the PMO-DTS will conduct quarterly DTA Seminars. These seminars are targeted at the managers of the DTA(s) and those personnel who will be developing their organization's DTS hierarchies and performing DTA administrative setup functions. Selected personnel should attend these seminars approximately 90-150 days prior to their site's DTS fielding date, otherwise known as the site's D-day. The PMO-DTS will notify Service/Agency representatives as to the date and location(s) of the DTA Seminars and the number of seats they have been allocated.

The second phase of DTA Training will be a four-day functional training session for DTA personnel focusing on government policies and procedures, as well as software functionality for setting up the DTA structure for their organization(s). This training session is normally scheduled to run from Tuesday through Friday during the first week of site training. It is anticipated that this training will be conducted approximately 45-60 days prior to fielding. Training dates and the number of allocated DTA classes will be coordinated with the Service/Agency to support the site's fielding plan and provide "**adequate**" training for the site's primary DTAs. "**Adequate**" training means that for planning purposes, a site will be allocated, as a minimum, sufficient training seats to support the training of 75% of the site's "**primary**" DTAs. Also, for planning purposes, one (1) DTA training seat will be allocated per 500 travelers. These are planning figures only, used to develop initial DTA training requirements with the site. Specific seat and class requirements will be further refined with the Services/Agencies as part of the site fielding plan. **Due to equipment requirements and optimal instructor/student ratio, class size will be limited to twenty (20) students.**

5.2 TTT Training

TTT training is a 4-day functional training session designed to focus on the site's DTS trainers to prepare them to instruct travelers on the use of DTS for Document Preparation (i.e. Authorizations, Vouchers from Authorizations, and Local Vouchers) and AOs on Route and Review approval procedures. Training also includes instructions on all governing DOD travel

policies and procedures. This 4-day session normally follows the DTA training and is conducted from Monday through Thursday of the second week of training.

Based on the site's preferences, TTT may be conducted using one of two (2) methods: either one (1) two day TTT session followed by two (2) days of coaching for the sites DTS trainers; or, a second two (2) day TTT session may be conducted for the site to provide them with additional DTS trainers. Details for the sites TTT preferences will be discussed and finalized during the site planning sessions.

Regardless of the TTT schedule chosen, as with DTA training, class size is limited to 20 students due to equipment requirements and optimal instructor/student ratio.

TTT training is scheduled as part of the site's fielding plan to be conducted approximately 30 days prior to a site's anticipated fielding date. This should allow for adequate time for site trainers to provide instruction to the AOs and frequent travelers from the organizations who will initially be using DTS. **For planning purposes, each site will be allocated no more than one (1) TTT training session.**

5.3 Help Desk Training

Help Desk training is a four (4) hour training session that is normally conducted on the Friday of the last week of the DTA/TTT two-week training session. The purpose of this training is to explain the DTS Help Desk philosophy, Tier concept, and escalation procedures. Recommendations for staffing, management, data collection and general Help Desk practices will be explained. The importance of tracking Help Desk requests and possible solutions will also be discussed. Lastly, all the various DTS Help Desk reference materials will be reviewed, and students will participate in actual problem solving exercises.

DTS Help Desk training is not designed to make the student a technical expert on all possible problems that may be encountered when using DTS. The training has been designed to provide the necessary tools and information for DTS Help Desk personnel to better support their customers in using DTS and assist in problem solving.

Help Desk training is not "hands-on" functional training, but is delivered in a classroom lecture format. There is no limit on the number of students who may attend. **Since the DTS Help Desk is envisioned to be part of the overall DTA responsibilities, individuals should not be selected to attend DTS Help Desk Training who have not previously attended a DTA training session, have not received on-the-job training as a DTA, or are unfamiliar with the DTS software.**

6 SELECTING PARTICIPANTS/TRAINING COURSE PREREQUISITES

6.1 DTA Training

In determining who should attend DTA training, consideration must be given by the Service/Agency to the organization's DTA structure. While all areas of the DTA are important, due to limited training seats, it is recommended that priority for attendance at DTA training be given to individuals who will be serving as Lead DTAs (LDTA), Organizational DTAs (ODTA), Finance DTAs (FDTA), or Transportation Officers (TO). It is also recommended that individuals selected to attend DTA training have a minimum of 12 months remaining in the organization upon completion of training. All DTA training participants must be familiar in

using computers with a Windows-based operating system. Also, if an individual attends DTA training, and they are also going to be a DTS trainer for their organization, there is no requirement to attend the TTT course. **However, it is highly recommend that a person who will be both a DTA and DTS trainer attend TTT because of the additional emphasis on instructional techniques for AOs and Travelers.** The following information on the duties and responsibilities for the LDTA, ODTA, and/or FDTA may be helpful in determining who should be selected to perform these duties and would need to attend DTA training.

The rank/grade of the individual(s) selected should be appropriate for the duties and responsibilities they will be charged with and allow them the ability to make key decisions for DTS at their site or organization:

- **LDTA** – The duties and responsibilities of the LDTA are generally to ensure that DTS implementation for their site is planned and that system requirements, such as the organizational structure, sub-organizations, lines of accounting, routing lists, conditional routing lists, authorizing officials, and travelers are identified prior to deployment.
- **ODTA** – The ODTA is the individual(s) who is responsible for the administration of DTS at the organization level and, as such, assists the LDTA with overall DTS administration for the site. The ODTA should include individuals at the organization level who are involved in their organization's current travel process and who will remain so involved in DTS. Suggested individuals who may be designated as ODTAs are resource managers, transportation managers, communications/IT managers, security managers, and personnel managers.
- **FDTA** – The FDTA may consist of one or more budget, resource management, or accounting and finance personnel who would be responsible for managing and supporting the financial aspects of DTS at the organizational and/or site level. **(see DoD Financial Management Regulation, Volume 9, Chapter 2, and the DTS Financial Field Procedures Guide for additional information on FDTA duties and responsibilities)**
- **TO** – The TO is the individual who may be responsible for the coordination of certain categories of travel at the installation. The TO, as an integral part of the overall travel business process for a site, may need to have a more in-depth knowledge of DTS.

6.2 TTT Training

It is highly recommended that personnel selected by their organizations to attend TTT training have prior experience as an instructor and, because of the nature of the subject matter, have expertise in travel-related areas such as finance, personnel, transportation, etc. Also, individuals selected to be DTS trainers should be in a position within their organization that will allow them adequate time to prepare and conduct DTS training. As with DTA Training, it is also recommended that individuals selected to attend TTT training have a minimum of 12 months remaining in the organization upon completion of training. All TTT participants must be familiar using computers with a Windows-based operating system.

6.3 Help Desk Training

Individuals should not be selected to attend DTS Help Desk Training who have not previously attended a DTA training session or have not received on-the-job training as a

DTA and are not familiar with the DTS software. Consideration should also be given to selecting personnel for Help Desk training who may currently be serving on a site's Help Desk for another automated system and have previous experience in this area. As with DTA and TTT training, it is recommended that individuals selected for Help Desk Training have a minimum of 12 months remaining in the organization upon completion of training.

7 ADDITIONAL TRAINING INFORMATION

Prior to attending DTA, TTT, or Help Desk training, it is highly recommended that all training participants review the DTS training materials found at the following Web URL:

<http://www.defensetravel.osd.mil>

This Web address will connect you to the Defense Travel System Web site. All DTS training materials may be viewed at the Training Section. WEB based training for DTAs, AOs, and Travelers is underdevelopment and will also be made available in the future.

8 DELIVERY OF TRAINING

A combined PMO-TRW team will deliver both DTA and TTT training. Help Desk Training will be facilitated by the PMO-DTS staff. A PMO-DTS representative will lead the training team. **As previously indicated, due to equipment requirements and optimal instructor/student ratio, class size will be limited to twenty (20) individuals for DTA and TTT training.**

9 ENTERPRISE WEB TRAINING SYSTEM (EWTS)

The DTS EWTS provides for a "live" web-based training system that mirrors the functionality of the DTS Web production system. The environment provides a sustainment training capability for DOD DTS sites for the conduct of "in-house" DTS Training. This capability also provides access to the most current version of the DTS web mode software for use at the local level for both new users (e.g. Travelers, AOs) and for refresher training. The system will allow travelers and AOs "hands-on" access to the DTS software and the ability to create "training" authorizations, local vouchers, and vouchers from authorizations.

Each designated site's DTS EWTS training environment may be setup (tailored) to reflect the site's own DTS organizational administrative setup for use during its follow-on traveler/AO training sessions. Use of the DTS EWTS requires that a site training organization be established and that a site be issued training certificates for use with EWTS.

The DTS EWTS will provide real-life experience with the DTS system in a training mode. The system will allow the routing of documents for AO approval. The DTS EWTS will allow access to all components of the DTS, i.e., Digital Signature, DTOD and GDS reservation system, and Payment Module. Connectivity to the Passenger Name Record (PNR Gateway) for CTO actions is not part of the system, thereby precluding the creation of actual reservations. There is also no external interface to the Payment Module, thus precluding interaction with the DOD Accounting and Disbursing System (DADS) and any financial obligations.

The DTS EWTS is part of the overall DTS training program. As such, it will be set-up and made available to all Phase I and II sites as part of their scheduled training activities. It should not, however, be viewed as a "stand-alone" product. Without proper training, it will be difficult for sites to tailor and use the EWTS.

9.1 Government Training

This training will consist of classroom instruction conducted in a lecture format. These materials may be reproduced at the local level and are available for download at the PMO-DTS Web site listed in section 7.

9.2 TRW Training

Training will include hands-on activities that replicate the use of DTS in various scenarios as a DTA, AO, and traveler. All participants at a DTA or TTT course will be provided with all required training materials to conduct follow-on initial and sustainment training. Additional training materials and manuals may be downloaded at the TRW DTS Web site listed in section 7. For CTO personnel, TRW will coordinate training, as required, to insure that all CTO personnel, prior to the site(s) which they provide CTO services for fielding DTS, are thoroughly familiar with the operations and use of DTS.

10 COORDINATION AND SUPPORT

All Phase I and Phase II DTS sites will receive adequate training based upon the training needs of their organizations and their site-fielding plan. Exact training dates will be determined from several factors including the site's fielding date and availability of training resources.

To ensure that training is properly coordinated and that available training seats for all classes are fully utilized, it will be necessary for each site to identify a Training Point of Contact (POC). This individual will be responsible for coordinating all training requirements for their site's organizations, including any tenants, with the PMO-DTS.

The site's schedule and allocation of DTA and TTT class seats will be managed by the PMO-DTS in close coordination with the Services/Agencies, and TRW. All organizations will be afforded an adequate number of training seats to meet their needs. Information will be disseminated to the Services/Agencies via their DTS Training POC to assist in identifying training sites, dates, and the organizations supported by each training event. Training class rosters for each class will be provided by the site DTS Training POC to the PMO-DTS training lead NLT 2 weeks prior to the conduct of training.

The PMO-DTS Training Team is responsible for ensuring all required equipment is available to conduct DTA and TTT training. Organizations providing facilities for the training classes will not be required to provide computers, but will be expected to provide general classroom support, LAN access, audiovisual capabilities (to include TV and VCR), electrical power connections, tables, and chairs, to the maximum extent possible.

Specific training support requirements will be identified by the PMO-DTS to the site in advance of the scheduled training. Each site will be required to complete a Training Site Survey that is located on the TRW DTS Web site. A USERID and password will be provided to each site so that they can access the survey. Completion of the site's Training Survey will be identified as part of the site's DTS fielding plan.

The following options are available to the Service or Agency when determining where DTS training is to be conducted and required equipment. They are listed in the order of preference and should be considered in this order when the site Training POC begins the training planning process:

1. **On-site using TRW training equipment** – **THIS IS THE PREFERRED OPTION FOR CONDUCTING TRAINING AND SHOULD BE THE SITE’S FIRST AND PRIMARY CHOICE.** The Training Site Survey will provide the site Training POC with all necessary information regarding training room size and configuration as well as connectivity requirements for the conduct of training.
2. **Off-site using TRW training equipment** – Should adequate training facilities not be available on-site or other issues, such as security or connectivity, prohibit the conduct of training on-site, an off-site location may be used. If an off-site location is required, it will be the responsibility of the host Service or Agency to coordinate for the use of and provide all necessary funds to pay for the off-site training location.
3. **At TRW training facilities, Fair Lakes, Virginia** – Based on availability, the TRW training facility may be used for the conduct of a site’s DTS training. Use of this facility will be coordinated by the PMO with TRW. If training is to be conducted at TRW there are no costs related to facility usage; however, it is the responsibility of the site to fund all necessary student TDY expenses associated with attending training. **THE PMO IS NOT RESPONSIBLE FOR ANY TRAINING RELATED TDY COSTS SHOULD THIS OPTION BE CHOSEN BY THE SITE.**
4. **WEB Training/Distance Learning (TBD)** – At the present time, this option is not available. When completed, the WEB Training/Distance Learning option will provide a site the ability to train travelers and AOs without having them leave their site. It will also give the site the option of conducting training in this manner as opposed to attending a formal DTs class of instruction.

11 ADDITIONAL TRAINING FOR PHASE I & II SITES AND PHASE III SITE TRAINING

11.1 Phase I & II

Phase I and II sites that feel they require additional training classes (DTA or TTT) beyond their initial allocation may purchase these classes from TRW. Coordination for the purchase of additional training classes will be made through the PMO-DTS and will be subject to the availability of PMO and TRW training resources.

11.2 Phase III

All training for Phase III sites is the responsibility of the individual Service/Agency. This training may be conducted using previously trained assets or purchased through the PMO-DTS from TRW. **THE PMO IS NOT RESPONSIBLE FOR PROVIDING TRAINING TO PHASE III DTS SITES.**